



Request for Proposal (RFP): Trialling creative tools and methods for policy development

1. Overview of the work

1.1. Context

A new Policy Lab function was recently established in Wellcome's policy team to drive greater creativity and impact in the way that Wellcome does policy work. By using creative tools and methods for policy development, alongside more traditional approaches, we aim to generate better policy insights and recommendations that reflect the complexities, nuances and political realities of the policy areas in which we work. Taking imaginative approaches may also help to pique the interest of the decision-makers, in an increasingly crowded influencing space. Overall, we hope that adding these tools, methods and approaches to Wellcome's policy 'toolkit' will encourage new ways of working within our team and increase the impact Wellcome has in delivering its mission across discovery research, mental health, infectious disease and climate and health (read more about Wellcome's priorities [here](#)).

1.2. Objectives

To launch the Policy Lab function, we would like to commission 3-5 suppliers to prototype ambitious and creative tools or methods that support policy development. We anticipate that these projects will run for approximately 6 months. At the end of the process (in late 2023), we would like to bring all suppliers together at an external event, organised by Wellcome, to showcase the tools/methods and discuss what we have learnt with the wider policy community. We expect the trials to be run independently of Wellcome's own policy work but we would like to learn from suppliers as they carry out the work, capture lessons from the process, and use this to inform and inspire Wellcome's future policy work.

2. RFP Specification

We would like to commission between 3 and 5 organisations (or groups of organisations) to each prototype an ambitious, creative and experimental tool, method or approach that supports policy work. This section sets out the specification for this work. Suppliers should use this section to fully understand Wellcome's requirements and to inform their response.

2.1 Scope

	What are we looking for?
Type of tool/method	<ul style="list-style-type: none">We would like suppliers to prototype a tool or method that can be used to generate new policy insights. The primary purpose of the tool must be to generate new insights on a policy topic to improve policymaking. Methods may also help to engage policymakers with an issue and motivate action, but this should be the secondary focus.For example, a game or simulation to help think through different options for an infectious disease surveillance system would be in scope because it could generate insight that a more traditional approach like a stakeholder roundtable would not. In contrast, an immersive experience that simulates future temperatures in X country to push for earlier net zero targets (if there is no insight gathering exercise alongside it) would not be in scope because it only seeks to engage participants with an existing position.

Subject matter	<ul style="list-style-type: none"> • We are interested in the tools and methods being trialled rather than the policy content but we recognise that each tool or method needs a policy context in which it can be tested. • We expect suppliers to set out the policy question/issue their tool or method seeks to address as part of the proposal. • We recognise that the most creative ideas can come from unexpected places. For this reason, strategic alignment with one of Wellcome's 4 areas of focus is preferred but not essential. If the context in which you plan to work is not aligned to one of these areas, please explain how the learning from the trial could be applied to Wellcome's work in these areas in future.
Defining 'creative'	<ul style="list-style-type: none"> • We are looking for new and imaginative ways to develop policy/generate new policy insights. This could be about <i>what</i> is trialled, <i>where</i> it is trialled or <i>who</i> is involved. • We recognise that creativity differs by context so we would like suppliers to explain what makes their proposal creative in the context in which they are working. • We would love to see ideas that have never been tried before and push the boundaries of conventional policy approaches. We will also consider proposals for relatively new tools and methods that are being trialled somewhere different for the first time
Geographic scope	<ul style="list-style-type: none"> • We will consider proposals that focus on policy at a global, regional, national or local level in any geography, as long as suppliers can demonstrate that the approach/learning could be applied to Wellcome's work in future.
Equity, diversity and inclusion	<ul style="list-style-type: none"> • We strongly encourage proposals that place equity, diversity and inclusion (EDI) objectives at the forefront of their approach, including creative policy processes that support communities (including marginalised and underrepresented groups) to play a role in shaping and informing policy decisions that affect them. • We would also like suppliers to demonstrate how they will consider EDI principles in their ways of working and the composition of their team.
Evaluation and learning	<ul style="list-style-type: none"> • We would like suppliers to evaluate and capture lessons from the trials they have undertaken. We recognise that six months is not long enough to have policy impact, so this is more about reflecting on and learning from the <i>process</i> (e.g. Which elements of the process worked/did not work as expected? What was the added value of the approach over traditional methods? What would you need to change if you ran the process again?). • We expect that not all trials will work as planned – we are comfortable with this, provided the lessons are captured and reflected upon.

2.2. Team specification

We are looking for proposals from teams that bring together a mix of relevant expertise across policy development, innovation/design and evaluation. This expertise could sit within one organisation but we also encourage proposals from groups of organisations/individuals who would like to collaborate. Organisations could include, but are not limited to, think tanks, academic policy centres, NGOs and agencies specialising in policy, design thinking and/or



innovation. We are particularly keen to receive proposals from organisations with different perspectives to Wellcome and those that we have not worked with before. Where we receive multiple proposals of similar quality, we will give preference to proposals that give us the opportunity to engage organisations we have not worked with before.

Where groups of organisations/individuals wish to collaborate, we ask that one of these organisations is identified as the lead contact. In a successful multi-partner bid, the lead organisation will be contracted and must be prepared to sub-contract partner organisations.

2.3. Ways of working

We would like this request for proposals to have mutual benefit for Wellcome and the teams we appoint, and our intention is to work with successful teams as partners more than suppliers. For Wellcome, our priority is to learn from the projects that we support rather than closely monitor them, and we would like to engage with successful teams throughout the process. We are relatively open to what this engagement looks like, but it could involve observing ideation meetings, attending workshops or events, and viewing early drafts of relevant materials. This will be discussed and agreed with successful suppliers. For suppliers, we hope that this call will provide the space to experiment, take informed risks and learn from the other suppliers that we have commissioned. We are keen to facilitate this by bringing successful teams together as a cohort throughout the process to share, learn and reflect. This process will culminate in a one-day Policy Lab event in late 2023 or early 2024, which will give suppliers the opportunity to showcase their work and discuss what they have learnt with other organisations interested in experimenting with creative policy approaches. The precise format of this event will be determined by Wellcome in due course.

2.4. How Wellcome will use this work

The key objective for Wellcome is to learn from the projects that are commissioned and to share this learning with others. Internally, we intend to use the evaluations and advice provided by suppliers to reflect on how we can integrate more creative practices into our own work in future. Externally, we anticipate sharing what we have learnt through the Policy Lab event, publication of the evaluation reports and other communications (e.g. blog posts). As we are interested in the tools and methods that are produced rather than the policy content, we will not be promoting or adopting any policy content/recommendations produced by these processes – these will be owned by the supplier who may take this content forward as they wish.

2.5. Provisional timelines

We expect the projects to be delivered over a period of up to 6 months (roughly May to November 2023). Exact dates will be agreed with chosen suppliers.

May 2023	Contracts finalised, work starts
May/June 2023	Kick-off meetings
June 2023	Suppliers brought together to share, learn and reflect
Sept 2023	Suppliers brought together to share, learn and reflect
Early Nov 2023	Draft outputs shared with Wellcome
Late Nov 2023	Final outputs delivered to Wellcome
Late 2023/Early 2024	Projects presented at Policy Lab event



2.6. Deliverables

- A report that summarises the trial you conducted and what you learnt from the process (suitable for external publication by Wellcome)
- Advice to Wellcome on how lessons from the project could be applied to Wellcome's future policy work (for internal use by Wellcome)
- An approx. 3-minute video summarising the tool/method trialled and what you learnt (Wellcome will be able to provide some technical support for this)
- A presentation of the work at a Policy Lab event in late 2023 or early 2024

2.7. Budget

We have a total budget of £350k (inc. VAT) for this work and would like to use this to commission between 3 and 5 suppliers (**i.e. up to £90k per proposal**).

3. RFP Timetable

#	Activity	Responsibility	Date
1	RFP issue to suppliers	Wellcome	22 Feb 2023
2	Suppliers submit questions to Wellcome	Supplier	01 March 2023
3	Wellcome shares Q&A with suppliers	Wellcome	03 March 2023
4	Submission of expression of interest (EOI) to RFP	Supplier	6pm GMT/UTC on 08 March 2023
5	EOI Evaluation Period	Wellcome	09-15 March 2023
6	Invite full RFP Response	Wellcome	16 March 2023
7	Submission of full RFP Response and submission of TPSRA2 form	Supplier	6pm GMT/UTC on 03 April 2023
8	RFP Evaluation Period	Wellcome	04-18 April 2023
9	Selected Suppliers will be informed and invited to supplier presentation	Wellcome	19 April 2023
10	Presentations with shortlisted suppliers	Wellcome	w.c. 24 April 2023
11	Notification of Contract Awards	Wellcome & Supplier	02 May 2023
12	Contract Negotiation	Wellcome & Supplier	May 2023
13	Contract Start Date	Wellcome & Supplier	End May 2023



4. Response Format

The following section supports the RFP timetable by providing further detail on the key steps of the process:

4.1. Expression of interest

Suppliers are asked to submit a short expression of interest via [this link](#) in accordance with the RFP timetable. In your expression of interest you will be asked to outline:

- Which organisation/individual will be the contracting supplier? If it is a company, please provide full company name, address, and company registration number
- Your proposed approach to this work and why it is creative (max. 250 words)
- How the learning could be useful for Wellcome's future policy work (max. 250 words)
- Which other organisation(s)/individual(s) will be involved in the bid (if any)?
- A non-binding cost estimate as a single figure in GBP

We will review expressions of interest to ensure that proposals fit within the scope of the RFP. Where we are satisfied of this, we will invite organisations to submit a full response to the RFP in accordance with the RFP timetable. Where a supplier has more than one idea for a tool/method to trial, they may submit more than one EOI but will only be invited to submit a full proposal for a maximum of one idea. **Please note that you should only submit a full response to the RFP if you have been invited to do so.**

4.2. Supplier Q&A

Prior to the submission of your expression of interest, suppliers are invited to submit questions to the Wellcome team. Questions should be submitted via email to the Wellcome contact on or before 01 March 2023. Answers to all questions will be shared with suppliers on 03 March 2023 and made available on the Wellcome 'contract opportunities' page.

4.3. RFP Proposal

Suppliers who are invited to submit a full proposal should cover the following areas in their response (max. 10 pages, excluding any references or images):

1. **Approach:** Describe your approach to the work, including the tool/method you will trial, how you will trial it, and the policy context in which you will trial it
2. **Creativity:** Explain why you consider your tool/method to be creative and why this is appropriate for the policy question or issue you are trying to address
3. **Evaluation and learning:** Outline your approach to evaluation and learning during the project, including how you plan to involve the Wellcome team (n.b. as mentioned above, this is more about evaluation of process than impact)
4. **Stakeholders:** Outline the relevant stakeholders for this work and how you plan to involve/engage them
5. **Relevance to Wellcome:** Explain how you think the learning from this work might be useful for Wellcome's policy work in future
6. **Project team:** Outline the proposed project team with a brief description of their roles in this work and relevant previous experience



7. **EDI:** Describe how the team will embed equity, diversity and inclusion (EDI) within the approach to the project
8. **Delivery plan:** Provide a timeline for the work, including clarity on dates for key milestones and deliverables
9. **Budget:** Provide a detailed budget including breakdown justifying the proposed costs to meet Wellcome's requirements
10. **Risks:** Outline any major risks and challenges you foresee with meeting the project requirements. Please include your mitigation strategies for these risks

4.4. Contract Feedback

This section allows suppliers to provide specific feedback to the contractual agreement which will be used should their proposal be successful. This feedback will be used to guide negotiations with successful suppliers at the contracting stage. Contract feedback should be incorporated into your full proposal as an annex and in the following format:

Clause #	Issue	Proposed Solution/Comment

Suppliers submitting proposals as a registered company should review Wellcome Terms and conditions [document](#).

Individuals submitting proposals as a sole trader (not registered) should review this [document](#).

Individuals submitting proposals through their own personal services company please highlight this to the Wellcome contact immediately (see point 6 below).

4.5. Information Governance

Suppliers invited to submit a **full proposal** are asked to complete the Third Party Security Risk Assessment ([TPSRA2](#)) assessment which can be found here before the full RFP submission deadline for Wellcome to assess how you handle data.

4.6. Presentation

Following submission of your full proposal, a subset of suppliers will be shortlisted and invited to present to the Wellcome team via a virtual Microsoft Teams meeting. This meeting will last 60 minutes in total, with 25 minutes for presentation and the remaining time for Q&A.



5. Assessment criteria

Proposals will be assessed against the following criteria:

Methodology (30%)	<i>Quality:</i> Is the proposed approach clear and logical? Will it deliver credible outputs? <i>Novelty:</i> Is the proposed approach creative, experimental and ambitious? <i>Utility:</i> Will the proposed approach provide useful learning for Wellcome's future work?
Delivery and Outputs (30%)	<i>Feasibility:</i> How feasible is the delivery plan? Are there significant risks associated with the timelines, and how well are they mitigated? <i>Evaluation and learning:</i> Are there plans in place to evaluate the process and capture and reflect on lessons throughout the work?
Team and experience (30%)	<i>Skills and experience:</i> Does the team have the relevant skills and experience to deliver this work? <i>Approach to EDI:</i> Are EDI considerations embedded throughout the project (including in team composition and project approach)?
Budget (10%)	<i>Value for Money:</i> Does the proposal reflect good value for money?

6. Prospective Suppliers Personnel - IR35 and Off Payroll Working Rules

Before the RFP response deadline, prospective suppliers must make the Wellcome Contact aware if they are intending to submit a proposal where the services will be provided by any individuals who are engaged by the prospective supplier via an intermediary i.e.

- Where the prospective supplier is an individual contracting through their own personal services company; or
- The prospective supplier is providing individuals engaged through intermediaries, for the purposes of the IR35 off-payroll working rules.

7. Independent Proposal

By submission of a proposal, prospective suppliers warrant that the prices in the proposal have been arrived at independently, without consultation, communication, agreement or understanding for the purpose of restricting competition, as to any matter relating to such prices, with any other potential supplier or with any competitor.

8. Funding

For the avoidance of doubt, the output of this RFP exercise will be funded as a **Contract** and not as a Grant.

9. Costs Incurred by Prospective Suppliers

It should be noted that this document relates to a Request for Proposal only and not a firm commitment from Wellcome to enter into a contractual agreement. In addition, Wellcome will not be held responsible for any costs associated with the production of a response to this Request for Proposal.



10. Sustainability

Wellcome is committed to procuring sustainable, ethical and responsibly sourced materials, goods and services. This means Wellcome seeks to purchase goods and services that minimise negative and enhance positive impacts on the environment and society locally, regionally and globally. To ensure Wellcome's business is conducted ethically and sustainably, we expect our suppliers, and their supply chains, to adhere to these principles in a responsible manner.

11. Disability Confident

The Wellcome Trust is proud to be a Disability Confident Employer (DC Level 2) and we encourage all our partners and suppliers to do the same. More information about this can be found on the government website [Disability Confident employer scheme and guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/disability-confident-employer-scheme). Disability Confident is creating a movement of change, encouraging employers to think differently about disability and take action to improve how they recruit, retain and develop disabled people.

12. Accessibility

Wellcome is committed to ensuring that our RFP exercises are accessible to everyone. If you have a disability or a chronic health condition, we can offer adjustments to the response format e.g. submitting your response in an alternate format. For support during the RFP exercise, contact the Wellcome Contact.

If, within the proposed outputs of this RFP exercise, specific adjustments are required by you or your team which incur additional cost then outline them clearly within your commercial response. Wellcome is committed to evaluating all proposals fairly and will ensure any proposed adjustment costs sit outside the commercial evaluation.

13. Diversity & Inclusion

Embracing [diversity and inclusion](#) is fundamental to delivering our mission to improve health, and we are committed to cultivating a fair and healthy environment for the people who work here and those we work with. As we learn more about barriers that disadvantage certain groups from progressing in our workplace, we will remove them.

Wellcome takes diversity and inclusion seriously, and we want to partner with suppliers who share our commitment. We may ask you questions related to D&I as part of our RFP processes.

14. Wellcome Contact Details

The single point of contact within this RFP exercise for all communications is as indicated below:

Name: Chloe Watson
Role: Senior Policy Adviser
Email: c.watson@wellcome.org